

**Actuarial & Employer Services Branch**

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Reply to: AESB Member Transactions Unit

ELECTION OF OPTIONAL MEMBERSHIP – ELECTIVE OFFICER

California Government Code Section 20322, provides that an "elective officer" is excluded from membership in the California Public Employees' Retirement System (CalPERS) unless he or she files with the Board of Administration an election in writing to become a member.

"Elective officer" includes any officer of the Senate or Assembly who is elected by vote of the members of either or both of the houses of the Legislature and an appointive officer of a city or county occupying a fixed term of office, as well as officers of the state or contracting agencies elected by the people. Exceptions are: (1) Effective July 1, 1994, elected or appointed officers of a county superintendent of schools, school district, or community college district, or of a contracting agency that is not a city or county, who serve on public commissions, boards, councils, or similar legislative or administrative bodies, other than city councils or county boards of supervisors, are excluded from membership with no right to elect optional membership unless continuously holding the office since June 30, 1994; (2) Effective July 1, 1994, any person holding the office of city attorney was removed from the elective officer definition and became subject to non-elective, non-optional CalPERS membership qualifications unless continuously holding the office since June 30, 1994; (3) Effective January 1, 1997, city and county elected or appointed officers who serve on public commissions, boards, councils, or similar legislative or administrative bodies, other than city councils or county boards of supervisors, are excluded from membership with no right to elect optional membership unless they have continuously held the office since December 31, 1996. Please refer to the Public Employees' Retirement Law and the CalPERS Procedures Manual or State Handbook for further information on elective officers.

The election of optional membership may be filed at any time while a compensated elective officer holds the office and the office is not otherwise excluded by law or excluded by an agency's contract. Once elected, the membership remains in effect for all future service in an elective officer position with the same employer unless there is a significant break in employment. Once membership is established, it may be terminated only upon permanent separation from employment covered by CalPERS and subsequent withdrawal of retirement contributions. While a CalPERS member, you may contribute and receive credit for any previous eligible service in the elective officer position. The Member Services Division, P.O. Box 942704, Sacramento, CA 94229-2704, will handle any such requests to purchase previous service. The form to request optional member arrears service is on the CalPERS website at www.calpers.ca.gov, or you may request the "CalPERS Service Credit Purchase Options" booklet from your employer, in which a copy of the "Optional Member Service" form (PERS-MSD-372) is included.

If your election for optional membership in CalPERS will result in concurrent service with employment credited in a private benefit plan or another public retirement system, please contact that organization for information regarding the impact of such concurrent service. If your election will result in concurrent service under CalPERS, please contact the Member Transactions Unit, Actuarial & Employer Services Branch, at the above phone number, before completing this election form.

PLEASE COMPLETE AND RETURN THIS ENTIRE FORM TO YOUR PERSONNEL OFFICE SO THEY CAN ESTABLISH YOUR MEMBERSHIP.

I AM AN ELECTIVE OFFICER AS DEFINED ABOVE, being a/the (enter Officer title) _____ of the

(Agency name) _____ (Agency contact) _____ (Agency phone) () _____ .

My present term will expire on _____, 20 ____ . In accordance with the provisions of Government Code Section 20322, **I ELECT TO BECOME A MEMBER OF CALPERS.** I request that this election be filed with the Board of Administration of the California Public Employees' Retirement System (CalPERS) as my election to become a member.

I UNDERSTAND THIS ELECTION IS IRREVOCABLE AS LONG AS I REMAIN IN EMPLOYMENT AS A MEMBER.

(Printed Name in FULL)

(Signature)

(Date)

(Social Security Number)

(Address)

()

(Daytime Telephone Number)

(City & State)

(ZIP Code)

INFORMATION PRACTICES STATEMENT

The Information Practices Act of 1977 and the Federal Privacy Act require the California Public Employees' Retirement System to provide the following information to individuals who are asked to supply information. The information requested is collected pursuant to the Government Code (Sections 20000, et seq.) and will be used for administration of the Board's duties under the Retirement Law, the Social Security Act, and the Public Employees' Medical and Hospital Care Act, as the case may be. Submission of the requested information is mandatory. Failure to supply the information may result in the System being unable to perform its function regarding your status. Portions of this information may be transferred to: State and public agency employers, California State Attorney General, Office of the State Controller, Teale Data Center, Franchise Tax Board, Internal Revenue Service, Workers' Compensation Appeals Board, State Compensation Insurance Fund, County District Attorneys, Social Security Administration, beneficiaries of deceased members, physicians, insurance carriers, and various vendors who prepare the microfiche/ microfilm for CalPERS. Disclosure to the aforementioned entities is done in strict accordance with current statutes regarding confidentiality.

You have the right to review your membership file maintained by the System. For questions concerning your rights under the Information Practices Act of 1977, please contact the Information Coordinator, CalPERS, 400 Q Street, P.O. Box 942702, Sacramento, California 94229-2702.